

July 9, 2007

RE: Brad Campbell v. Central Washington University (CWU)
Allocation Review HEU No. 4621

Dear Mr. Campbell:

The Director's review of CWU's allocation determination of your position has been completed. The review was based on written documentation. By letter dated March 30, 2007, CWU determined that your Maintenance Mechanic 3 position should be abolished and the duties and responsibilities of the position should be allocated to the Scientific Instructional Technician 4 classification. You feel that you still perform all the duties of the Machinery Master Mechanic.

Background

This review has a long history. In summary, in October 2003 CWU's Human Resources Office received an updated position description (PD) for your position. CWU did not conduct a review of your position, but considered the PD an update only. In preparation for the Department of Personnel's (DOP) January 1, 2006 implementation of the Group 2/3 classification consolidations, in August 2005, CWU asked your supervisor to assure that your position description was accurate. In November 2005, CWU asked your supervisor to review the proposed new occupational category for the Trades Helper/General Maintenance Occupational Category. The crosswalk for the implementation indicated that positions allocated to the Machinery Master Mechanic classification would crosswalk to the Maintenance Mechanic 3 classification in the Trades Helper/General Maintenance Occupational Category. Your supervisor did not provide an updated position description and did not respond to whether your position fit within the proposed classification. By letter dated December 14, 2005, CWU notified you that your position would be reallocated to the Maintenance Mechanic 3 classification, effective January 1, 2006. On January 5, 2006, DOP received your request for a Director's review.

By letter dated January 12, 2006, DOP acknowledged receipt of your request and asked CWU to conduct a review of your position. CWU responded by letter dated January 24, 2005 (sic). On March 14, 2006, your review request was assigned to a Director's review investigator. By letter dated April 20, 2006, the review investigator directed CWU to conduct a review of your position and your Director's review request was pended until completion of CWU's review.

On November 3, 2006, CWU's Human Resources Office received a draft PD for your position from William Bender, Chair of the Industrial and Engineering Technology department. The PD

reflected the assignment of new duties to your position. CWU's Human Resources staff requested comments from other faculty and on November 28, 2006 an updated version of the PD was submitted. In December 2006, CWU's Human Resources staff discussed the duties of your position with Dr. Bender and additional changes to the duties were made. The PD for your position was finalized on January 17, 2007.

By letter dated March 30, 2007, CWU issued its determination regarding the allocation of your position. CWU determined that your duties and responsibilities were best described by the Scientific Instructional Technician 4 classification. As a result, CWU eliminated your Maintenance Mechanic 3 position and offered you the Scientific Instructional Technician 4 position as a layoff option.

On June 8, 2007, Karen Wilcox informed the parties that the Director's review of the allocation of your position would be conducted based on written documentation and confirmed June 8, 2007, as the deadline to submit additional documentation.

Summary of Mr. Campbell's Perspective

For the record, you expressed your concern and frustration in your attempts to be paid for the work you perform. You do not feel the CWU's Human Resources staff understood the work you do. You stated that you perform duties that are not included in your job classification and that when you have asked for those duties to be included, your request has been denied. You argue that even though your position is now allocated to the Scientific Instructional Technician 4 classification, you continue to perform all the duties of a Master Machinery Mechanic.

Summary of CWU's reasoning

CWU determined that the preponderance of the duties assigned to your position are of the nature, complexity and scope found within the Scientific Instructional Technician 4 classification. CWU acknowledged that while 20% of your duties could be found in the Category Concept for Trades Helper/General Maintenance Occupational Category, this category did not describe the primary purpose of the position which is instructional support. CWU determined that your position has significant responsibility in planning, developing, implementing and reviewing three aspects of the scientific instruction support programs, including budget and purchasing activities, preparing course support budgets and cost estimates, and preparing and administering course supporting material and planning and developing laboratory experiments. CWU reallocated the position to the Scientific Instructional Technician 4 classification which better represents the requirements and expectations found in the position description.

Director's Determination

As the Director's designee, I carefully reviewed all of the documentation in the file, including the PD you submitted in October 2003. This PD was signed by you and your supervisor. However, it appears that under the duties section, rather than describing the specific duties and responsibilities you performed and the percentage of time you performed them, the PD includes a compilation of broad statements. As such, this PD is not useful in determining the specific duties and responsibilities assigned to the position or the percentage of time the duties were performed in October 2003. In addition, the unique circumstances leading up to this review also negate the value of the October 2003 PD. Subsequent to this time, the duties and responsibilities

of your position were reconfigured and were allocated to the Scientific Instructional Technician 4 classification. Therefore, for purposes of this review, the PD in place at the time of the allocation of these duties to the Scientific Instructional Technician classification is more relevant. In addition, this is the PD on which the institution based their determination.

Included in the documentation you provided for this review was a Position Description Worksheet for your Maintenance Mechanic 3 position which indicated that it was what you submitted to Dr. Bender. This document is not signed or dated. In addition, under the notation "Bill Bender Version," you provided a Position Description Worksheet for an Instruction and Engineering Technology Educational Technician position. This document is not signed or dated. The final Position Description you submitted contains the notation "Now my new job title" and is for the position Scientific Instructional Technician 4. This document is not signed or dated; however it appears to be the PD used by CWU in determining the proper allocation of the position.

You also submitted a Performance and Development Plan for the period of September 2006 to September 2007 for the position Maintenance Mechanic 3. This document is not signed or dated. In addition, you submitted a Performance and Development Plan for the period of January 2007 to January 2008 for the position Maintenance Mechanic 3. This document is not signed or dated but it does contain the notation "What was signed." It is important to note that a position review is not an evaluation of your performance.

The purpose of a position review is to determine which classification best describes the overall duties and responsibilities of a position. A position review is neither a measurement of the volume of work performed, nor an evaluation of the expertise with which that work is performed. A position review is a comparison of the duties and responsibilities of a particular position to the available classification specifications. This review results in a determination of the class that best describes the overall duties and responsibilities of the position. See Liddle-Stamper v. Washington State University, PAB Case No. 3722-A2 (1994).

Salary inequity is not an allocation criteria and should not be considered when determining the appropriate allocation of position. See Sorensen v. Dept's Of Social and Health Services and Personnel, PAB Case No. A94-020 (1995).

For purposes of my review of your position, I compared the duties and responsibilities described in your Scientific Instructional Technician 4 position description to the classification specifications in place on January 5, 2006, the date on which the Department of Personnel received your allocation review request. I specifically reviewed the Trades Helper/General Maintenance Occupational Category which includes the Maintenance Mechanic 3 classification, the Engineering Technician classification series, and the Instructional and Classroom Support Services Occupational Category which includes the Scientific Instructional Technician 4 classification.

Rationale for Determination

In summary, and as described in the PD for your position, you:

- 30% Develop, produce, assemble, fabricate, calibrate, troubleshoot, maintain or repair instructional equipment, instructional laboratories, hardware and machines; support, troubleshoot and repair computer based equipment and hardware and interface to peripherals for data acquisition and instruction.
- 30% Provide instructional and teaching assistance for the laboratory components of technical classes.
- 15% Manage supplies, budgets and purchasing to support the instructional needs of the department and estimate equipment and supplies for classes.
- 10% Perform end of the day security checks of classrooms and offices.
- 10% Perform journey-level duties in trades such as welder, electro-mechanical, electrical, computer hardware and software, plumbing, and carpentry.
- 5% Supervise graduate and undergraduate lab assistants.

You perform complex technical and laborious tasks in designing, developing, manufacturing, assembling, installing, calibrating and repairing instruments, apparatus and equipment used in the Industrial and Engineering Technology Department. You support the computer based equipment and interfaces to peripherals and data acquisition, develop estimates for equipment and supplies, place orders when necessary, manage associated funds and reconcile accounts. In addition, you are the safety coordinator for the shops and labs.

The Category Concept for the Trades Helper/General Maintenance Occupational Category states:

Positions in this series perform general maintenance, repair, remodeling and construction duties utilizing working knowledge of several related skill fields such as electrical, plumbing, carpentry, welding, painting and machinist work. Incumbents inspect, repair, install and maintain physical facilities, locks and maintain and repair machinery and equipment. Positions may be required to lead or supervise and instruct offenders, inmates or residents in general maintenance activities.

The focus of your position is not described by this category concept. Your position is focused on providing technical instructional support for Industrial and Engineering Technology Department. You do not perform general maintenance, repair, remodeling, and construction duties. Your former Master Machinery Mechanic classification merged into the new Maintenance Mechanic 3 classification. Positions allocated to the new Maintenance Mechanic 3 classification perform construction, maintenance, repair, and modification of buildings, facilities, mechanical equipment, machinery, and specific apparatus and utilize a working knowledge of several related skill fields such as plumbing, electrical, welding, carpentry, and machinist work. They perform duties such as:

Repair and remodel buildings; frame walls, rafter, and roof; hang, tape, finish and paint interior sheet rock walls; install counter tops; build custom fit cabinets, desks, bookcases, work tables, and benches; hang doors; paint interior and exterior;

Install and maintain plumbing, electrical and mechanical fixtures; install, maintain, and repair pipes, valves, drains, basins, faucets, lavatories, air conditioning, laundry equipment, kitchen equipment, gates and hydrants;

Construct forms and pour concrete using a wood float and steel trowel to finish the cement; build concrete and wood cribbing; lay concrete blocks and bricks;

Perform preventative maintenance and repair on all types of mechanical equipment such as laundry, kitchen, hospital, laboratory and air-conditioning equipment; clean or change filters, change oil, grease, adjust drive belts; inspect sprockets, shafts and bearings to ensure proper operations.

The focus of your position is not maintenance mechanic work. Rather you perform specialized functions to provide technical instructional support for the Industrial and Engineering Technology Department. Your position does not fit within the Trades Helper/General Maintenance Occupational Category.

The Class Series Concept for the Engineering Technician class series states:

Following requirements and specifications from engineers or scientists, perform engineering technician work designing, developing, fabricating, modifying, assembling and repairing various mechanical, electro-mechanical, agricultural, hydraulic, pneumatic, or electronic instruments, apparatus and equipment within an engineering, scientific, or instructional application.

This series is distinguished from the Electronics Technician series by spending a majority of time in the design, development, and fabrication of specialized engineering, scientific, or instructional instruments, apparatus and equipment.

This series is distinguished from the Computer Maintenance Technician series by maintaining and/or repairing computer or other microprocessor-controlled integrated digital equipment which is integrated or interfaced with specialized engineering, scientific, or instructional instruments, apparatus and equipment.

Some components of your position fit within this class series concept; however, those components comprise only 30 percent of your overall duties and responsibilities. The overall focus of your position is more broad in scope and includes providing instructional assistance, supervising lab assistants, overseeing security of the labs and classrooms, and performing journey-level work in various trades. The overall scope and focus of your position does not fit within this class series concept.

The Category Concept for the Instructional and Classroom Support Services Occupational Category state:

Positions in this series perform various instructional and classroom support services including academic and vocational instructional programs, scientific instructional programs, and extension educational activities. Duties typically include assisting in the individualized or group instruction of students in development of learning skills; or working with faculty or instructors in

preparing, modifying, and/or developing instructional programs, teaching aids, materials and equipment associated with shop, classroom, or laboratory instruction which requires positions to have technical knowledge of the discipline(s).

The overall scope, focus, and intent of your position fit within this category concept. You provide instructional and classroom support for the Industrial and Engineering Technology Department, assist in instructing students, and work with faculty in preparing, modifying and developing materials and equipment associated with shop, classroom, and laboratory instruction.

The Scientific Instructional Technician 4 classification is the highest level class in this category. The Distinguishing Characteristics for the Scientific Instructional Technician 4 classification state:

Positions at this level supervise staff and/or have significant responsibility in planning, developing, implementing, and reviewing scientific instructional support programs. Responsibilities involve supervising staff performing scientific instructional support including professional and technical work for an entire school, college, or department; or providing technical and scientific expertise in the coordination of projects and programs related to the development of instructional materials for science faculty and external science education professionals.

Your overall duties and level of responsibilities are encompassed by the distinguishing characteristics for this class. While not allocating criteria, the Examples of Work for the Scientific Instructional Technician 4 classification encompass the scope and breadth of your position. Specifically, your position:

Supervises staff . . . ;

Prepares and administers course support budgets; prepares cost estimates, fiscal projections, and financial reports;

Develops plans for facility and equipment changes; designs or arranges for design development to meet teaching needs;

Coordinates functions related to scientific instructional programs . . . ;

Plans new approaches to educational problems that may involve the use of instructional material in its traditional form or in specifically designed innovative forms;

Consults with scientific [staff] . . . to assess their media needs; obtains and plans new media content, offering a thorough understanding of technical and scientific content;

. . . .

Studies and evaluates new trends and developments in . . . equipment technology; makes recommendations for changes and/or improvements to faculty and professionals relating to their specific educational problems;

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The Scientific Instruction Technician 4 classification does not specifically address your responsibilities for developing, producing, assembling, fabricating, calibrating, troubleshooting, maintaining or repairing instructional equipment, laboratories, hardware and machines or the support you provided in troubleshooting and repairing computer based equipment and hardware and interfaces to peripherals for data acquisition and instruction. However, positions allocated to this class develop scientific instructional support programs and provide technical and scientific expertise which could be viewed as encompassing your expertise in designing, developing, manufacturing, assembling, installing, calibrating and repairing instruments, apparatus and equipment used in the Industrial and Engineering Technology Department. Nonetheless, these duties comprise only 30 percent of your assigned duties and responsibilities. Allocation decisions are made based on a preponderance of the duties and responsibilities assigned to and performed by a position.

The focus and intent of your position and your overall duties and responsibilities are best described by the Scientific Instruction Technician 4 classification. Your position is properly allocated.

Appeal Rights

WAC 357-49-018 provides that either party may appeal the results of the Director's review to the Personnel Resources Board by filing written exceptions to the Directors' determination in accordance with Chapter 357-52 WAC.

WAC 357-52-015 states that an appeal must be received in writing at the office of the Board within thirty (30) calendar days after service of the Directors' determination. The address for the Personnel Resources Board is 2828 Capitol Blvd., P.O. Box 40911, Olympia, Washington, 98504-0911.

If no further action is taken, the Director's determination becomes final.

Sincerely,

Holly Platz
Director's Review Investigator

cc: Pam Zupan, CWU
Karla Shugart, CWU
Lisa Skriletz, DOP

List of Exhibits for Campbell HEU No. 5621

- A. Request for Director's Review form received January 5, 2006, with attachments:
 - 1. Major Functions, Distinguishing Characteristics and Typical Work
 - 2. December 14, 2005 letter from Pam Zupan to Bradley Campbell
 - 3. Maintenance Mechanic ~~Lead~~ III classification, class code 5244 (abolished February 10, 2006)
 - 4. Machinery Master Mechanic classification, class code 5226 (abolished February 10, 2006)
- B. Letter dated January 12, 2006 from Shirley Cooper, DOP, to Eric Galbraith, CWU, acknowledging receipt of review request and requesting information from CWU
- C. January 24, 2005 (sic) letter from Pam Zupan, CWU, to Shirley Cooper, DOP, responding to request for information, with enclosures:
 - 1. Letter dated December 14, 2005 from Pam Zupan to Bradley Campbell (duplicate A-2)
 - 2. Position Description form received by CWU Human Resources on October 30, 2003
 - 3. Position Description form received by CWU Human Resources on November 4, 1993
 - 4. Machinery Master Mechanic classification, no class code
 - 5. Machinery Master Mechanic classification, class code 5226 (duplicate A-4)
 - 6. Trades Helpers/General Maintenance Occupational Category
- D. Letter dated March 14, 2006 from Shirley Cooper to Bradley Campbell assigning Director's review investigator
- E. E-mail string dated April 19, 2006 from Kari Lade to Brad Campbell re: Scheduling Confirmation for Bradley Campbell v CWU
- F. April 20, 2006 letter from Kari Lade, DOP, to Bradley Campbell and Pam Zupan canceling the conference call scheduled for April 26, 2006 and requesting that CWU conduct a position review of Mr. Campbell's position
- G. October 11, 2006 letter from Teresa Parsons to Brad Campbell requesting status of review request
- H. E-mail from Brad Campbell to Teresa Parsons, DOP, re: Directors' Review Request #HEU 4621
- I. March 26, 2007 letter from Karla Shugart, CWU, to Rebecca Bowers, Dean of College of Education and Professional Studies, re: Results of Classification Review – Brad Campbell

- J. March 30, 2007 letter from Karla Shugart to Brad Campbell re: Results of Classification Review
- K. April 20, 2007 confirmation of written review and notice of exhibit deadline from Karen Wilcox, DOP
- L. E-mail dated June 6, 2007 from Brad Campbell to Karen Wilcox re: Director's review and Additional Exhibits, including:
 - 1. January 25, 2006 e-mail from Pam Zupan to Brad Campbell
 - 2. April 27, 2006 e-mail from Pam Zupan to Brad Campbell
 - 3. April 18, 2006 e-mail from Brad Campbell to KariL@DOP.WA.GOV
 - 4. March 13, 2006 incomplete e-mail from Brad Campbell to William Bender
 - 5. Undated document from Dr. J to William J. Bender
 - 6. "What I submitted to Bill Bender!" - Undated and unsigned Position Description Worksheet
 - 7. "What Bill wrote up after I submitted the above!" – Undated and unsigned Position Description Worksheet
 - 8. "What was signed" – Performance and Development Plan from January 2007 to January 2008
 - 9. "Now my new job title" – Unsigned and undated Position Description Form
 - 10. Unsigned and undated Performance Development Plan from September 2006 to September 2007
 - 11. March 30, 2007 letter from Karla Shugart to Brad Campbell (duplicate J)
- M. Trades Helpers/General Maintenance Occupational Category (duplicate C-6)
- N. Engineering Technician Class Series Concept (found on Engineering Technician I classification)
- O. Instructional & Classroom Support Services Occupational Category